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ABSTRACT

This book is intended as a practical guidebook for those involved in continuing education, in particular, and for the boards and staff of nonprofit organizations and community groups, in general. It is designed to show these individuals how to develop community resources when additional support is needed for community education. Specific guidelines are included on the processes and techniques necessary to gain additional support from other agencies and groups for community education projects in British Columbia. Chapter 1 discusses community resource development. The next five chapters cover these aspects: (1) organizing for community resource development, (2) developing a project, (3) finding where the resources are, (4) constructing a proposal asking for support, and (5) receiving support. Additional titles to read or places to write for more detail on the topics are recommended. Canadian sources are used wherever possible; American sources (general works) are included, where appropriate. Illustrative charts and an index are provided. (YLB)

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COMMUNITY RESOURCE DEVELOPMENT

A Community Education Guidebook

Maureen Cassidy
Frank Cassidy

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HOW TO USE THIS GUIDEBOOK

The following are some hints which will hopefully assist the reader in using this book and gaining ongoing access to particularly helpful sections of it:

* Read the book through carefully at least once. The process of community resource development is developed, in step-by-step form, throughout. Try to get a feel for and a comprehensive knowledge of this proces.

* Once you have read the book, use the tables for reference. Feel free to photocopy them if you choose. Use them as checklists as you follow the process from step to step.

* Use the table of contents and the index in the back for references to specific sections and subjects.

* Develop a small complementary library, based upon the one described in the final chapter.

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CHAPTER ONE

WHAT IS COMMUNITY RESOURCE DEVELOPMENT?

Let's be honest. If you are about to read this book, you or your organization has made the decision that you need something and that something is more money. One of the purposes of this book is to show you that money is not all you either need or want.

Community Resource Development is intended as a practical guidebook for those involved in continuing education, in particular, and for the boards and staff of non-profit organizations and community groups, in general. It is intended to show you how to develop community resources when additional support is needed. Included are specific guidelines on the processes and techniques necessary to gain additional support for community education projects in British Columbia, that is, support from agencies and groups from outside of your own formal organization.

The techniques suggested are ones which are generally applicable to all community groups, but they are especially relevant to persons and organizations who are concerned with community education. This form of education provides benefits which extend beyond individuals to communities. As such, it involves a community-based process. The principles of this process are essentially the same as the one described in this book.

Library shelves abound with books on fundraising and grantsmanship. Here we have chosen to take the broader approach of community resource development. This is done for several reasons. First, and most importantly, the term "community resource development" helps you realize that most of the support you can realistically expect will be from your community. Sometimes that "community" will be broadly defined, as in "all Canadians" or "all British Columbians" or "all handicapped people." More often, your community will be more specific--the town you live in or the exact group, such as native court workers, that you are working with. There are very, very few people in this world who are willing to give anything to anyone that they do not feel some degree of connectedness with, and this fact must always be one of the premises upon which you work.

The second and most obvious reason for using the concept of community resource development is to change your goal from the mere pursuit of dollars to the development of other resources. Money is not the only resource; there are others such as thoughtful advice, donations of services and facilities, or mutually advantageous partnerships. It may be easier to have a winery donate its products for a wine and cheese party at a senior citizens conference, for example, than to have the federal New Horizons Program fund an item in your budget application for "promotional beverages."

Finally, development is a fundamental watchword for this book. The process of gaining resources for a project from the

Community Resource Development: A Definition

Community - one or more groups of people who live in the same place or who share some other common interest.

Resource - a means of meeting a want or a need.

Development - the process of bringing something from a rudimentary or immature state to greater elaboration or completeness.

Community Resource Development - the process of meeting the needs of people who are tied together by common interests through a variety of means, including, most importantly, their own efforts and existing resources.

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

community is an ongoing one. It is a skill which must be acquired, nurtured, and continually re-learned. There must be a mutual give and take between your group and its community or communities. Your group must learn to handle the additional resources it develops and learn how to return the benefits gained from the community back to the community.

Community education groups seeking outside support for themselves today face a hurdle. Not only do they have to learn whom to ask, how to ask, and what to ask for, they have to face the hard fact that more and more groups of all kinds are asking for a piece of a pie that is shrinking. In 1980, the last year for which statistical taxation data is available, individual donations as a percentage of individual assessed income fell to 0.5%, down from 2% in 1958; corporate donations as a percentage of corporate profit after tax were at 0.8%, down by half from 1.6% in 1958.[1] Need we say that, with limitations on government expenditures, government support may be also difficult to obtain.

Pay attention to these figures, but don't let them discourage you. Notice that they are for money and money may not necessarily be what you need. Realize too that, even though the competition may be hard, it is quite possible that you or your group may well be the more deserving, better organized, and more convincing. You may well secure outside support. The simple trick is you have to learn how to ask for it. That is one of the things this guidebook can help you to do.

When is it reasonable to seek additional support for a community education project? The best rule is not to invest time and energy looking for additional resources until you are absolutely sure you cannot find what you need within your regular funding system. Make sure that you or your organization is not spending more time and money finding support than you are getting back. A recent study of the British Columbia public school system shows that, at present, schools are actually loosing money on fundraising projects such as door-to-door candy sales and car washes.[2] Community resource development, done properly, does take time. In most cases, if it is done correctly, the results should be worth the effort, but the expenditure of resources to obtain resources must be monitored carefully.

The most reasonable type of activity to seek additional support for is a project, something above and beyond regular activities. Few formal granting agencies, for example, give support for normal operating expenses or new capital construction. Even fewer will give to relieve deficits or cover budgetary shortfalls. People and resource agencies like to give to something specific, something that needs to be done but is not at present being done. They like to see that there will be an end to the need for their support, that the problem will be resolved, that the group can become self-supporting, or that the need will be met.

Generally, resource agencies feel most comfortable supporting only a portion of a project. It gives them confidence to know

that there are others supporting your project too, that someone else thinks your project is worthwhile. Tangible community support for aspects of your project can be extremely useful in getting the ball rolling. They remove the onus of being the sole supporter from the resource agency.

Make sure that you yourself can handle the amount of additional support for which you are asking. There certainly can be too much of a good thing! Make sure before you seek additional support that you have the will and the capacity to utilize the resources which you are requesting. Be certain that you have the staff; that your administrators can find the extra time the project will take; that the new support will not scare off long-term volunteer aid; that the topic of the project is one with which your organization can feel comfortable. Make sure that you are controlling your resources and that your resources are not controlling you.

Community resource development, as you will find in the following pages, requires, as one author has put it, "only considerable thought, careful planning, thorough organization and hard work."[3] A tall order? Maybe not. Thought, planning, organization, and hard work are the kinds of things your group should be doing anyway in the normal course of affairs. It may very well be that preparing for and engaging in community resource development may improve the functioning of your group by improving your planning capabilities, your ties with and

The Process of Community Resource Development

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

understanding of the community, and your self-appreciation of your own goals and purposes.

This book will cover the five aspects of community resource development:

* organizing for community resource development.
* developing the project.
* finding where the resources are.
* constructing a proposal asking for support.
* receiving support.

As you read this book, please try to remember that it is a short work on what is a very large topic. It has been kept concise to enable you to read it in its entirety and to use it as a practical workbook. If you wish to follow the topic in more detail, additional titles to read or places to write are recommended. Wherever possible we have used Canadian sources. Americans as a group have printed significantly more material on the subject than Canadians. Some of their general works have been included, where appropriate.

Further Reading:

Joyce Young. Fundraising for Non-Profit Groups: How to Get Money from Corporations, Foundations and Government. Vancouver: International Self-Counsel Press, 1981 (2nd edition).

Gordon L. Goldie, Ltd. Paying for the Piper: A Fund-Raising Manual for Non-Profit Organizations. Toronto: Ontario Federation of Symphony Orchestras, 1982.

Armand Lauffer. Grantsmanship and Fund Raising. Beverly Hills: Sage Publications, 1984.

Three of the better general guides, covering all aspects of the question.

CHAPTER TWO

ORGANIZING FOR COMMUNITY RESOURCE DEVELOPMENT

As you engage in the process of community resource development, always keep in mind that you are a person dealing with other persons, living people with needs, feelings, and goals of their own. A lot of the sage advice from the experts on grantsmanship comes down to the simple human fact that the process involves one person asking another person for help. Keeping people in mind may sound simplistic, but it is a principle that is often forgotten as word processors churn out form letters or needs assessments become percentages compared to mean ratios.

If you have an idea for a community education project you need some additional help in developing, how do you begin? First of all, you should back away from the project and ask yourself about the community needs you want to meet. In other words, define the problem before you define the solution. Otherwise the project may not do what you want it to do; the project may become part of the problem.

Once you have defined the problem, then ask yourself and those with whom you are working if there are any ways of dealing with it other than seeking external or additional support. If

Keep People in Mind

* Ask yourself who you are and who your allies are in the community.

* Talk about the needs of the community, not about the application requirements of the resource agency.

* Spend as much time as possible asking for help from people face-to-face, or at least by personal letter or telephone call.

* Realize that granting agencies help people and organizations, not projects. You need to convince real people that you and the people of your organization are the ones to do the work.

* Recognize that the more you and the people being aided by your project become actual, tangible persons to those with the resources, the more likely you are to get help.

* Make sure that as many people in your community know about your project and support it as possible.

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

so, try these ways of solving the problem. Only after you have followed this process, should you think about developing a project.

As you begin to develop a project for which you are going to seek outside support, the first and most practical matter you should investigate is the question of whether or not your organization has been issued a registration number designating it as a charitable group under the Income Tax Act of Canada. This number is available from Revenue Canada. For more information and to see if you qualify, call your local Revenue Canada office and ask for their Information Circular Number 80-10, "Registered Charities." Possession of this number gives an organization the right to issue receipts for donations. As a result, the donor can have a deduction from income tax. Very few corporations or foundations will give to you without this number. If you do not have this number or cannot get one, consider working on your project with a group which does have one.

Fostering Community Support

The next thing you should look into is gaining or reaffirming support in your community for the work you are doing. This should be done for several reasons. If you intend to seek outside aid from corporations, government, or foundations, they will want to know that your organization is well respected by members of your constituency and that it is indeed delivering

the goods and services you say it is. Often you will need to produce letters of support from relevant community organizations and individuals previously involved with your group. It is a good idea to keep an ongoing file or scrapbook of all letters of support as they come in, so appropriate ones can be pulled and supplied to a funder.

Developing community support for a project is also useful since the people in the community are the ones that will likely be using the goods and services produced. Early involvement means an informed and prepared community, ready and waiting when a project actually begins.

Be sensitive to local power structures which can impinge upon the organization of a project. You may discover that a project is perceived as unnecessary or unwanted by key individuals or groups within your constituency. Don't bother to proceed until you make a strong effort to turn that opposition into active understanding and support.

Developing community support also means that you will get a better understanding of where local resources are located. Ask these questions about likely sources of support:

* Are they willing to write letters of support?
* Can they loan space for classes or meetings?
* Do they have personnel or volunteers who can help you either on a formal loan basis or from time-to-time as the need arises?
* Do they have contacts with funding bodies who can help you represent your case?

* Will they give you advice on how to proceed on the basis of their past experience?
* Can you publicize your project when it is off the ground in their newsletter or at one of their meetings?

As an experienced fundraiser once wrote: "Almost everyone likes to be asked for an opinion and, on giving it, becomes at least a little committed. The best way to convert a severe critic into the warmest of advocates is to seek his advice."[4] Speak in person to people with potential interest in a project. Get to them as early as possible in the planning stages. Be sure to include members of the group or groups targeted by a project and business and service organizations already active in the field. A major factor in the success of a project's development is the quality of the fabric of relationships which are built and managed throughout the process. Start early and be inclusive rather than exclusive.

As you develop support in the community, be thorough and systematic. Sit down and make a list of everyone you should inform and seek support from. Whenever you make arrangements to obtain a local resource or get some concrete suggestions, record them somewhere--either in a letter, in the minutes of a meeting, or in a memo to yourself. Don't forget to follow up later with a letter of thanks when advice works and when what someone asked for is achieved. Keep up the contact and flow of information throughout the whole of a project. Those you have consulted with in the early stages will want to know when a project is

successfully launched, how it is doing as it proceeds, and what the results are when it is finished.

Clarifying Community Needs

As your organization works on fostering community support for a project, this is also the time to begin to formulate, in broad terms, what the project will look like. At first, you should try to keep a project idea fairly generalized. Do not take the time now to figure out how many weeks it will run and how many manila envelopes you will need. This can come later. In the next chapter we will urge you to get very specific in the latter stages of project development, but, before that happens, you need to master the general context in which your project will be implemented.

You want to address the general questions of why the project is needed; why you are the one to do it; what your group requires in order to conduct it; and how to build the formal structures of control for it. Discuss these questions within your group before you get locked into a particular, specific plan. Talk to community contacts for ideas. If you are part of a larger organization, make sure that what you are thinking of doing has support higher up in the organizational structure; you may as well know before you go any further.

Presumably you wish to undertake a particular project because you feel it will help meet some actual needs in the community. It is important, therefore, to begin documenting this need as early as possible. Collect data which will enable a reasonable person

to conclude that conditions are not what they ought to be. Clearly establish that you and your group are the ones best equipped to handle its solution. Go to the library and make sure you are familiar with the obvious books on the subject. Try taking surveys if they seem appropriate. Ask people who already use your services. Collect information about your group and what it does: get your recent Annual Reports, news clippings about yourselves, copies of brochures you have done, significant letters.

Three very useful sources for continuing educators on determining and documenting needs are:

> British Columbia. Ministry of Education. Continuing Education Division. CE Programmer's Manual. Written by Brishkai Lund and Sandy McGechaen and prepared by the Adult Education Program, Centre for Continuing Education, University of British Columbia, Vancouver, B.C. 1981.
>
> British Columbia Ministry of Education. Continuing Education Division. Census Stats for Community Education: A User's Manual. Project conducted by Chuck Curteis of Baragar Enterprises, 1983.
>
> British Columbia. Ministry of Education. Continuing Education Division. Getting to Know Your Community: Data for Adult Education Programming in British Columbia. Project conducted by Gary Dickinson with the assistance of Diane Ish, John Stonehouse and Richard Berwick. Adult Education Division, Department of Administrative, Adult, and Higher Education, Faculty of Education, University of British Columbia, Vancouver, B.C., 1981. Second edition, 1984.

It is quite likely that you and the other members of your group already have a broad, and perhaps a very specific,

understanding of the problem area with which your project will be concerned. After all, you did come up with the idea. What you need to master, however, is the ability to convey to other people your sense of the needs and the appropriateness of your project to meet those needs.

The individuals, corporations, foundations, and government agencies from which you wish to receive resources will have to be informed and convinced about your project. You may not have their attention for long; you have to come to the point very quickly and clearly. Being able to formulate your project in a succinct, but general, manner will help you reach them. They will not want to know at first about how many telephones you need; they will want to understand the broad community needs. So should you.

Deciding What a Project Requires

During this period of generalizing before you become particular, you should begin to face the question of what your group requires in order to meet community needs. Put differently, you should try to determine in general terms how you are going to conduct the project and with what. In many cases you and your group will be seeking money and with that money you will purchase goods and services. In other words, you will hire people and provide them with the equipment, space, and other tangibles they need to perform what you have hired them to do.

Organize for Community Resource Development

* Define and document the problem and the resulting community needs.

* Develop community support.

* Include all who will be affected in planning and development.

* Clarify why your group is the one to meet a particular need.

* Identify what is required to meet the need.

* Make sure you have the support of your own organization.

* Establish an appropriate advisory committee.

* Avoid seeking money, if possible.

* Recognize that community resource development is an ongoing process.

* Be ready to help others.

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

In this period of conceptualizing the project, you need to come to general answers about two aspects of that easy equation of money=goods and services. First, you and your group must come to an agreement about how you will meet the community need: tutors? classes? public forums? an in-depth study? something else? What will the people in the project actually do? Make sure at this point that whatever you decide upon is reasonable, that you are using your project's goods and services in the best possible manner. Never forget that the success of a project is always measured by results, not good intentions.

Next, try to break into the money=goods and services equation, by trying to avoid the necessity of getting money as much as possible. Look at the goods and services you will be buying and try to discover if there are any you might get directly. Are you paying for space rental at commercial rates when there is donated space available if you asked? Is it appropriate to use volunteers for some aspects of a project? Are there corporate tie-ins, such as computer firms who will loan equipment to programming courses? See if corporations are willing to loan executives or staff to work on a project or give advice as needed. Not only are these contributions sometimes easier to obtain than money, they often indicate to resource agencies that your project has broad community support already and help you obtain support for other needs.

Controlling a Project

During the initial formulation of the project, it is also the time to set up the formal structures for control. While it is likely you and your group have ongoing supervision in the form of a board of directors or supervision within an organizational structure, you will want to set up an advisory committee for the project.

Advisory committees can serve two distinct purposes. You may want to select people for one or the other purpose or pick a mix to combine the two. The first purpose of an advisory committee is to have members who can offer their expertise and sage advice on the content of a project and its management. You have these members on your committee to help you do a better job.

The second purpose of an advisory committee is to have members who can help you form linkages with other community groups in which you are interested. These groups can be those specifically affected by the project or having an abiding interest in the community in general. Or they can provide ties to resource sources or fundraisers themselves. You have these members on the advisory committee to help you directly in your quest for additional resources and community support.

The advisory committee should meet at least once during the initial formulation of a project, once shortly after a project actually begins, and once at the conclusion of a project for evaluation. The size of the committee should be appropriate for the size

of the project. For example, it is not fair to bring together twenty busy people to consider a project with a budget of $500. The members should be selected carefully and should be appraised of all significant developments as the project proceeds. Their authority should be clarified and respected. They should be provided with all necessary information and given appropriate access to project workers.

Planning Ahead

The task of organizing for community resource development as described here is an ongoing process. Even as an organization gears up for one community education project which requires additional support, it should be thinking of what lies down the road when that project is over and another one is being conceptualized. As we turn in the following chapters to the specifics of seeing a project through the stages of development, it should not be forgotten that those involved in community resource development should be watching and planning ahead to the next project. The wheels of resource development move slowly and need constant tending to keep rolling. Leads that don't work out for one project should be filed away and cultivated for the next one. Community awareness should be maintained.

Don't forget, too, that you and your group are yourselves a part of the community resource base. Be ready to help others

when they ask, serve on their advisory committees, and lend your people and space when you can.

Further Reading:

Susan Wismer and David Pell. Community Profit: Community-based Economic Development in Canada. Toronto: Is Five Press, 1981.

Case Study #1

The Royal City Development Project

The Royal City Development Project is a classic example of community resource development by a continuing education institution. Concerned about rising unemployment and a declining city centre, Douglas College invited people representing all sectors of the community to a meeting at the college in November 1983. Fifty people came and listened to a speaker from the Nanaimo Community Employment Advisory Society talk about community resource development in that area.

Approximately thirty-five people decided to become active in a local planning group and they convened a public meeting in New Westminster in January 1984. Business, industry, education, labour, professional groups and citizen associations were all represented. They identified their goal as the achievement of a sustained growth of employment opportunities within the Royal City, through a community-supported economic development program. To this end, they sought to foster government, private sector and volunteer/community group cooperation.

Within this framework, and with the continuing assistance of Douglas College, the Royal City Development Group sought to identify specific community-based projects which would enhance

the quality of life in the area. Two committees were struck. The Economic Development Committee was charged with preparing a community profile and an economic development strategy. The Community Development Committee was directed to assist others in developing employment opportunities by levering available resources from the public sector job creation programs.

The Economic Development Committee completed its Community Economic Profile in the Fall of 1984, providing a community inventory and completing the first step in planning the long-term economic development strategy. On the basis of this data, opportunities for new business enterprises or current business expansion were to be identified. Marketing and promotional tools were also to be developed to attract new development and enhance the New Westminster community.

The Community Development Committee focused its efforts on matching financial resources to community needs by assisting groups in the best and most appropriate use of public sector job creation programs. Projects emphasized providing meaningful employment to persons who have had difficulty competing in the labour market. A job club was formed with the local unemployment Action Centre. Help was also given to those employed persons desirous of having their own enterprises.

Following completion of the Community Economic Profile, planning focused on the development of a long-term economic strategy for the Royal City. Research involving a cross-section

of local citizens was begun to identify new growth prospects and marketing needs for the area. This stage of planning brought together the resources of business and three levels of governments in a joint planning effort to increase the economic stability of the community.

In order to seek and handle contracts, the Royal City Development Group became an incorporated non-profit society known as the Royal City Community Development Association and held its first Annual General Meeting in January 1985. The Association received $20,000 from Canada Employment and Immigration and matched this amount with locally raised funds from local businesses, City Council, and local financial institutions.

The work of the Royal City Community Development Association and Douglas College exemplifies the way continuing educators can form partnerships with community groups to accomplish important community goals. In doing so, they have not only sought support from foundations, governments and industry, but they have also generated important resources from within the community.

CHAPTER THREE

DEVELOPING A PROJECT

In this chapter and the following two, we are going to trace the steps involved in taking a project to the time when work actually starts on it. This chapter will focus on the initial development of a project. The next chapter will help you identify specific resource agencies or groups to whom you may wish to apply. The third chapter will aid you in developing a proposal asking them for support.

Developing a project and developing a proposal, although closely related and sometimes confused, are actually two different steps. The "project" is what you are concretely going to do; the "proposal" is a stylized format which endeavours to show a group with resources what your project is. The same project may have several different proposals written about it, since different resource groups have different formats for the proposals they accept.

In Chapter Two we traced the efforts which should precede actual project development. At this point, you will already have established the community need you wish to address, collected information documenting that need and your organization's ability to meet it, built the community support behind the project, begun

to garner as many non-monetary community resources as possible, and set up an advisory committee to aid and advise you. Now it is time for you and your group, working with your advisory committee, to make the project concrete, explicit, and precise.

The first thing you should be aware of when formulating your plans is that resource agencies, as noted previously, are, in fact, usually only interested in projects. This is the reason why we have used the term so frequently throughout the book. As one fundraiser once put it, you should try to "design a cup, not a funnel . . . your ideas should be capable of implementation with a limited, specified amount of funding."[5] A project can hold resources like a cup, not drain them off like a funnel. This means in practice that your project should be finite in length and its impact should be capable of being measured.

Understanding a Project

At this point, it might be helpful to write down a short (one page if you can do it) summary of what is to be done and how it is going to be accomplished. This will not only help clarify your own thinking on the subject, but the text can be modified and used later in the proposal writing stage. Write the piece with the perspective of describing a project for someone who is not familiar with your organization, your community, or the subject matter of your project. Give the completed draft to a friend who is not acquainted with the project and see if he or

she can, after reading it, give you a reasonable description of what you are doing and why.

Make sure your objectives are specifically and clearly stated. Try to keep these objectives few in number because at the end of the project your work will be judged by how many of your objectives you accomplish. The objective of "raising the reading level of twenty adults from grade three to grade five" is easier to accomplish than "improving the quality of life in Vernon."

Getting quite specific about what you want to do and why has an additional advantage: you can be quite clear about what you are committing yourself to do before you formally contract to do it. When the project is begun and commitments made is not the time to find out that you and your group are not "comfortable" being associated with the project or that you do not have the capacity to do what you unwittingly promised.

Now is also the time to get out your pencil and calculator and start working on the supporting data and budget sheets. Figure out some insightful way to present the data you have collected so that it can be easily appreciated. Charts, tables, and diagrams are all useful and can be included as appendices to your proposal. What you are looking for, if possible, is some clear and factual way to present your argument. If any data is missing, now is the time to get it. This is also the time to identify other supporting evidence you might include.

Get to work on preparing your budget for the project. Decide how many people will be working on the project and how much

each will be paid. You may want to decide how many workers will be full-time and how many part-time. Try to estimate as many of the anticipated costs as possible. Include the donated resources committed by other community groups, indicating in your budget that the relevant costs are already covered. This is particularly important because many resource agencies find it easier to respond positively to a project when they see that others have previously done so.

When you are making your estimates, resist the temptation to "pad" your budget on the assumption that a funding agency will automatically give you less than what you ask for. The people who assess proposals at resource agencies are, in many cases, experienced professionals in their line of work. They know how much certain items cost and how long it takes to perform particular tasks. If one of the items in your budget is way out of line with what might be considered a reasonable expense, the credibility of the work you have done elsewhere may be jeopardized. If you have some legitimate special and unusual expense, include an additional explanation for it.

While you are working on the budget, attempt to estimate the costs for the project as you would want it to look. Also try to estimate the figure below which it ceases to be viable. If you are asking for funding for five workers, and only get support for one, can the project proceed? Can you modify the project so that you can get by? When should you decide not

Formulate Comprehensive Project Plans

* Write a one-page summary of the project
* Collect and organize supporting data
* Prepare a preliminary budget
* Make sure you are capable of doing the project
* Remember to keep community needs in the forefront

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

to bother? Making these decisions now may help temper the urge to grab an inadequate sum later.

Building Capability

With a clear idea of the project and its costs and the number of employees involved, you and your group have to ask yourselves once again if your organization has the capability of taking on this project, or will the project "become the tail that wags the dog?"[6] How much time will it take to oversee the project once support is received? Can the probably over-extended administrator of your organization give adequate time to oversee the project? Have you thought through all the details connected with office space, secretarial assistance, class rooms, and so forth and included the necessary extras in the budget?

Since you're going to have to be able to show resource agencies you are capable of doing what you say you are going to do, you'd better work through your requirements beforehand. Is there a reasonable hope of hiring as many specialized personnel as you say you'll need? Are there training materials available which are suitable? Is the size of the project reasonable or have you set up a situation where five tutors fight over one student or where one tutor is overwhelmed by one hundred students?

Check out both the physical and personnel aspects of adding the project to your operation. Are there any hidden costs which you may have overlooked? Will your regular

accountant have to spend considerably more time doing the books? Is there a possible need to provide extra training and orientation for the current staff?

Keeping Community Needs in Mind

We have stressed development of the project before seeking out resource agencies to help you avoid the all-too-prevalent tendency of letting the criteria of the resource agency determine what your project should look like. Don't suddenly try to dig up Lilliputians for teaching literacy training to because you've heard that the Lilliput Lives Foundation has money to give out for that purpose.

Although in Chapter Five we will strongly advocate that you should write your proposal to meet the requirements of the resource agency, it is equally important to not pick out a resource agency, decide you can get a grant from that group and then try to come up with what you imagine they want. Always keep your project, your idea, your community's needs in the forefront of your planning. If it is a good project and if you go about getting support in the right way, help will come. When the support does come, you will have a project you feel comfortable with and one which your group will be able to handle.

Case Study #2

A Woodworking Shop

Not all efforts to get support are successful. Some end up being a fiasco. This is the story of one such effort. The names have been changed to protect the guilty.

Mike Casey was a college coordinator of continuing education in a small rural community in the Interior of British Columbia. The community was economically depressed with a high level of unemployment. Mike had a friend, Rudy Stone, who worked for a large governmental resource granting agency. While visiting the community, Rudy told Mike about a great new program called the Entrepreneurial Initiatives Program. This program would provide funds for the start-up and early operation of new businesses.

Mike knew several unemployed people in the community who had taken various courses at the college and had an interest in carpentry. Knowing that they had thought about starting a woodworking business, he told them about the new program and they asked if he would help them prepare an application. He agreed.

The group met one night at Mike's house. It wasn't an easy meeting. It turned out that the group had not previously discussed many aspects of the project. Some wanted to start a custom furniture shop; others wanted to make cabinets. A few weren't sure if they wanted to work full time at all.

After this meeting, nothing happened for a while. Then Mike received a call from his friend, Rudy. Mike mentioned the potential project to Rudy and the response was enthusiastic. Rudy volunteered to "pave the way" in the bureaucracy. He suggested that the group get an application together.

After his talk with Rudy, Mike called up a few members of the carpentry group and told them that the agency might be very interested in their project. The group met again several times and, after much difficult decision-making, developed an application for funds.

The application was submitted. The college indicated it might sponsor some courses on small business management if they would help the group. Rudy's agency received the application and provided encouraging signals. Subsequently, three separate teams of personnel from the agency came to the community to discuss the proposed project. The group began to get very excited. Plans were made. Differences continued to exist, but they were submerged beneath the thought that the sought-after funds would solve most of the problems.

This went on for several months. After the initial spate of visits, the agency was silent on the project. Rudy quit and went to South America. After many calls, Mike finally found someone who could give him some information: the project would not be funded. In fact, the program itself had never been funded. Mike told the group. To say the least, they were

disappointed and demoralized. After all the hopes and planning, the idea of a woodworking shop was discarded.

Over a period of years, Mike realized that he had broken an important rule of community resource development. He had allowed the money to "drive" the project. In fact, the project had been invented to take advantage of the funds--and the funds did not even exist! Mike was wiser. So, too, was the community in which he worked.

CHAPTER FOUR

FINDING WHERE THE RESOURCES ARE

When asked to offer his definition of the art of fundraising, one long-time fundraiser said: "You raise money when you ask for it, preferably face to face, from the smallest possible number of people, in the shortest period of time, at the least expense."[7] Our next chapter will discuss the process of asking for support. Here we shall devote ourselves to the question of whom to ask so that you can get what you need as efficiently as possible. Because each resource agency must be dealt with on an individual basis and because doing that job well takes considerable time and effort, it is absolutely necessary to pick which resource agencies you will apply to very carefully.

Resource agencies are generally divided into three different types: corporations, foundations, and governmental agencies. Each works with sometimes slightly differing perspectives and methods. In this chapter we will go into detail about each one of these groups. Each of the three contain hundreds, even thousands of potential agencies for granting funds.

In Canada, there are some seven hundred active foundations, for example. Not all of these foundations have any interest in your particular project. Most have a program or pattern of giving. That way they can concentrate funds and develop

competency in judging projects. Many have a geographical focus (only in Manitoba, for example). Many will specify fields of interest (health related). Many will give just for certain kinds of activities (research and development). Some foundations can get very specific. The Trans-Antarctic Association, for example, only supports the cost of travel by expeditions to Antarctica for scientific research.

Governments and corporations are equally specific about who and what they will support. Both of these groups, for differing reasons, are more difficult to investigate than foundations: governments because many of their programs come and go so quickly and corporations because much corporate giving is non-systematic and based upon the merits of an individual case. For each of the three groups, however, the basic task remains the same: you must endeavour to match your project with the implicit or explicit criteria of a resource agency.

Building the List of Prospects

Fortunately, a person setting out to build a solid list of prospects for support has many published aides available to help in the search. It is now possible in a reasonable amount of time and without much specialized prior knowledge to find out the kind of information we have discussed above for resource sources of all types. Changes in the Income Tax Act which became effective in 1977 have made it possible for researchers to sift through the responses of once-secretive foundations and to systematize

Make the Match with a Resource Agency

* Geographical.

  If the resource agency says its program is only for the Maritimes, it's only for the Maritimes, don't bother applying.

* Topical.

  Try to match your topic with its interests. For Ukrainian students, go to the Canadian Institute of Ukrainian Studies. If you're all geologists, go to the Canadian Geological Foundation. If it's educational, don't bother with a group that only does health (unless it's health education).

* Size of grant.

  Match the general size of the funding you request with the amounts usually given out.

* Timing.

  If you need the funding in six months, and the board has just allocated its annual grants, don't bother applying.

* Situational.

  Fit the stipulated requirements. If the grant is only for areas of high unemployment and your case is not in this category, don't bother applying.

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

information about them. The governments of British Columbia and Canada have published helpful source books. Information about corporations is available in standard library reference books.

The last twenty years has witnessed a great growth in easy-to-find help for groups looking for suitable resource agencies. This is due in part to the realization by the resource agencies themselves that it is to their own advantage to have their particular support criteria more easily known. A better informed public means that they will get applications which are to the point and have to spend less time dealing with groups who are applying to the wrong place, thus easing the resource agencies' work load.

Before we discuss foundation, government and corporate research guides in detail, let us consider exactly what kind of information you will be seeking. In general, you will want to find out all you possibly can about a resource agency before approaching it to make first contact.

In addition to specific facts, you will want to find out about the "intangibles" of a resource agency if you possibly can. Each resource agency has goals, habits, and ways of proceeding which are different from the rest. The Donner Foundation, for example, wants to be the big contributor, not a small one. One resource agency may like an innovative project, while another might shy away from it. Some like dealing with large, established groups; others pride themselves on helping the small new ones.

Know the Facts About a Resource Agency

* The appropriate contact person.

  Find out if the group has a person dealing directly with support requests. If not, get the name of the president, chief executive officer or equivalent.

* The correct telephone number and mailing address.

  Offices relocate. Make sure the facts you may get are current.

* Relevant granting policies.

  These may be given explicitly in some guidebooks. Find out as much as you can about the five factors listed toward the beginning of this chapter.

* Additional information which is available and how to get it.

  Annual Reports always should be obtained if they are published. Usually they are available, free of charge, upon request. Often they help to flesh out the vague generalities of a published guidebook. There may be application kits available with brochures and application forms.

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

Some sense of these preferences can be picked up through initial contacts with the resource agency. Other information can be gleaned from newspaper and magazine articles. Additional hints can be gathered from reading the Annual Report of the agency, or from individuals you may know who work with or for the agency. Tips on whom to approach at the resource agency (and especially introductions) or what to say at the initial point of contact can be invaluable.

An additional consideration that is very important and cannot be stressed enough is the value of personal contacts with a resource group. Strong personal connections which you and your group may have to a certain governmental agency, foundation, or corporation may make an application to it reasonable when for most cases this may not be so. You may have someone sitting on your board of directors or on the advisory committee for the project who has enough clout to help you transcend the traditional granting patterns. Certainly, if there are two potential resource agencies and you have personal connections with one of the two, apply first to the one with whom you have the personal connections.

When building your list of prospects, don't forget to talk with and ask the advice of other community groups who have done relatively similar projects. They may be able to steer you to resource agencies who have been helpful for them in the past.

Don't forget to consider whether a resource agency has given support to your group in the past. If the project was successful, they will likely be a good source for your new project. Your group and its ability to produce are a known quantity with them already. Most professional fundraisers advocate that every group keep an ongoing record on their successful and unsuccessful approaches to resource agencies which includes as much pertinent data as possible: date approached, date support received, how much requested, how much received, name of contact person, address, project description and the like. Most resource agencies are professional enough themselves to do the same with you and may resent being treated impersonally ("Dear Sir or Madam") when a particular person at the agency spent many thoughtful hours working with your group just a few short years ago.

In the sections which follow we will get specific about how to find sources which may be helpful to your group. The relevant procedures for finding the most appropriate resource agencies are outlined. These are followed by some suggested potential sources of support for continuing and community education groups.

If at all possible, learn how to do research for yourself. It is entirely conceivable that your specific project may fall under the purview of resource agencies who are not normally interested in continuing or community education. For example, community education efforts for native peoples may be supported

Learn Where the Resources Are

* Find a good match of your project and the criteria of various agencies.

* Discover all you can about a specific agency before the initial contact.

* Establish and firm-up personal contacts with agencies.

* Clarify the different kinds of aid and programs the various agencies provide.

* Maintain an awareness of the special interests of agencies.

* Keep a record of contacts with agencies.

* Locate and learn to use a variety of research resources on agencies.

* Seek the advice of others who have undertaken projects on similar topics or who have received resources from agencies you are contacting.

* Remember past successes and approach these agencies again.

* Keep posted on changes in agency goals and priorities.

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by agencies focusing on native peoples, not just community education. It is also the case that priorities of resource agencies change. What is a good prospect at this time may not be at a later date. Government programs are particularly changeable in this regard. Learn the process of community resource development; don't settle for a knowledge of the results of someone else's efforts.

Foundations

A man who has devoted his life to working with foundations once wrote: "The place of the modern, ideal foundation is very simply to fill in the gaps, the breaks, the crevasses that are always forming between private and public giving."[8] Although this high ideal is not always reached, foundation funding may be a reasonable alternative for your project.

Foundations usually disburse or pay out income earned from their capital base. This capital base can be established through the generosity of one individual or family in the case of family foundations. Alternatively, the capital base can be developed through the broad support, usually in the form of bequests, of many local community donors, as in the case of the community foundations. Or it can be set up by a corporation to regularize and stabilize a corporate donations program.

Because of their origins, most foundations are limited as to whom and what they can support and how much money they have to distribute in a given year. Their giving patterns tend to be

more stable than corporations who usually give a percentage of corporate profits, but the amount a foundation has available does depend upon the success of its investment portfolio.

The size and professionalism of Canadian foundations vary widely. The Canadian Directory to Foundations and Granting Agencies, Fifth Edition, lists those foundations with assets of more than $100,000. Of the 640 foundations analyzed, the top fifty hold 88% of the assets and make 74% of the grants. Only 7% of the listed foundations have full or part-time staff. Even among the top fifty foundations, less than half publish some form of regular report.[9]

Researching which of the many hundreds of Canadian foundations may be appropriate for you has been considerably simplified by the useful work of The Canadian Centre for Philanthropy. It can be contacted at:

The Canadian Centre for Philanthropy
185 Bay Street, Suite 504
Toronto, Ontario M5J 1K6
(416) 364-4609

This Centre offers a broad range of services to both resource agencies and applicants for support. Their services include a certificate program in fundraising management in association with Humber College; the publication of the journal, The Philanthropist; the sponsorship of lectures, seminars and national conferences on important developments in the field; and a strong program of advocacy about the role and importance of philanthropy.

Your immediate needs are best served by The Canadian Centre for Philanthropy's research and publications efforts. Since it began operation in 1980, the Centre has been researching, collecting and compiling information about foundations. This information is presented in a clear and concise manner in its publication:

> Canadian Directory to Foundations and Granting Agencies: Fifth Edition. Volume 1: Foundations. Toronto: The Canadian Centre for Philanthropy, 1982.
>
> This 353-page resource is available from the Centre at a cost of $47 to the general public. It is also available in most libraries. It is indexed in four ways: an alphabetical index by foundation name; an index of key people, foundation officers, directors, donors and senior staff; a geographical index, showing declared special interests.

The Canadian Centre for Philanthropy also maintains a computerized data base on foundations which contains up-to-the-minute information. For those needing such information they offer The Foundation Search service for a fee.

The Canadian Directory to Foundations also covers those American foundations which have given support in the past to Canadian groups. If you need to find out more about foundations in the United States, The Foundation Center offers services similar to The Canadian Centre for Philanthropy. It can be contacted at:

> The Foundation Center
> 79 Fifth Avenue
> New York, New York 10003

The Foundation Center publishes several annual directories and indexes, including the Foundation Directory, Corporate Foundation Profiles, and the Foundation Grants Index. These are, once again, likely to be at your local library in the reference section. As a rule, American foundations tend not to make many grants to Canadian applicants. Most experts in community resource development recommend that groups in British Columbia should not spend any, or certainly not a great amount of time in attempting to obtain support from American sources.

The following is a descriptive listing of some selected foundations which may consider applications from groups concerned with a community education need. This listing is certainly not a substitute for consulting the Canadian Directory to Foundations and Granting Agencies. It also in no way serves as a substitute for contacting an agency directly, talking with it, and receiving its Annual Report. The latter should be done before specific applications are made.

The listing is merely intended to show the diversity of foundation support and to help you build an understanding of the kinds of aid available. The selected foundations are listed in alphabetical order. There is no intended guarantee that any particular agency will support any particular project. Quoted material is taken from letters to the authors, Annual Reports, or brochures supplied by the foundations.

Credit Union Foundation of British Columbia
P.O. Box 2038
Vancouver, B.C.
V6B 3R9

Founded in 1958 by British Columbia Credit Union members, this foundation is funded by these members, credit unions, and associate member organizations. "It is interested primarily in providing supplemental grant-in-aid assistance to British Columbia resident students in need of financial assistance to pursue vocational, technical or academic training within British Columbia . . . . Grants are also given to mature students upgrading their basic education and skills to enter the work force." A brochure describing the foundation's program is distributed.

The Hamber Foundation
c/o The Permanent
Box 10152
Pacific Centre North
701 West Georgia Street
Vancouver, B.C.
V7Y 1E5
(604) 689-0611

"The Hamber Foundation was established in 1964 to assist in fostering and stimulating higher education, cultural activities and public welfare in British Columbia. The Foundation intends to provide financial assistance to qualified charitable, cultural and educational institutions, and to promote projects which would not be possible without the initiation of such special assistance." The foundation does not issue an Annual Report, but it will provide an application form upon request.

Laidlaw Foundation
Suite 203
60 St. Clair Avenue East
Toronto, Ontario
M4T 1N5
(416) 964-3614

The Laidlaw Foundation has developed from its beginnings in 1949 to become one of the major Canadian foundations. Its terms of reference have modified over the years. In 1983 the terms of reference of its Advisory Committee were restated "to support experimental and research projects, studies and activities which contribute to a better understanding of families in society and better access to rights, opportunities and benefits." Projects outside of Ontario must have "implications for broader programme and policy development." Laidlaw has supported a number of adult education projects in the past, including ones sponsored by the Rural Learning Association the Canadian Association for Adult Education and The Workers' Educational Association. A comprehensive booklet containing a bi-annual report and application procedures is published.

The Law Foundation of British Columbia
702-1199 West Pender Street
Vancouver, B.C.
V6E 2R1
(604) 688-2337

Constituted in 1969, this foundation distributes the interest earned from lawyers' trust accounts and investments. "The Foundation's resources are directed to five specific legislative areas: legal education, law reform, legal research, legal aid

and law libraries. Those areas are construed narrowly by (the) Board of Governors." Write a brief letter first to the Foundation, and, if the proposed work appears to fit the guidelines, it will request a more formal proposal. "A mix of funding sources, a lean program and demonstrated community or user support are the hallmarks of successful applicants. Those seeking support are urged to discuss their programs with the Foundation prior to committing time and resources in assembling a funding request." It publishes an Annual Report.

The Leon and Thea Koerner Foundation
Box 46669
Postal Station "G"
Vancouver, B.C.
V6R 4K8
(604) 224-2611 or 669-2618

"The objectives of the Foundation are to foster higher education, cultural activities and the public welfare, particularly in British Columbia. The Foundation intends to stimulate and invigorate cultural and educational life by enabling institutions and individuals to undertake activities which would not be possible without special assistance." The Foundation will not cover routine operating expenses or deficits or capital expenditures, nor will it sponsor research. Applications from universities or colleges should be approved by an appropriate officer of the institution. "The Foundation does not look favourably upon applications for projects that appear to be extensions of regular university or college curricula that should

find a place in the normal education budget, nor on those that appear to relate to a somewhat narrow technical field, nor for travel outside British Columbia for research or study purposes." This foundation is a professional, community-oriented organization. Most of its grants are small, in the $500 to $3000 range, so that it can help as many groups as possible. It publishes an Annual Report and a sheet of additional guidelines for universities and colleges.

The Macdonald Stewart Foundation
C.P. 12000
Succursale "A"
Montreal, Quebec
H3C 3P3
(514) 284-0228

The foundation operates within the three areas of medicine, education and the humanities and will fund continuing education activity. There is no Annual Report or grant application forms. "All applications must be in writing. Proposals should set forth the objectives and details for carrying them out, the qualifications of the persons and institutions involved, together with an estimated budget." This is one of the ten largest foundations in Canada. As a result of a change in its investment policy, it is "unable to consider any major new projects during the next three years."

The McLean Foundation
16th Floor
95 St. Clair Avenue West
Toronto, Ontario
M4V 1P2
(416) 964-6802

One of the top forty foundations in Canada, this foundation distributes about one-quarter of its donations in the field of

education. The foundation attempts to maintain a flexible donations policy, "with particular emphasis on projects showing promise of general social benefit but which may initially lack broad public appeal." Write for a copy of its informative public report which gives details of applications procedures, a listing of the groups which have been funded recently, and the size of each grant.

Vancouver Foundation
#900-1199 West Pender Street
Vancouver, B.C.
V6E 2R1
(604) 688-2204

This is one of Canada's very largest foundations and its largest community foundation. In the fiscal year which ended December 31, 1983, the foundation distributed over $11,000,000. "While originating and located in Vancouver the Foundation may help with projects throughout British Columbia." Its areas of interest are child welfare, cultural activities, education, medical research and youth activities. "Vancouver Foundation is interested in helping those organizations which are helping themselves. Our funds are used to supplement financial support from local community and other appropriate sources . . . . Priority is given to those programs/projects giving direct service to people." It will support capital projects, but it will not fund seminars, workshops, conferences and other single or short-term events. For a sympathetic insight into the work of the organization, be sure to read the article "Seed Money: the Vancouver Foundation Administers over $100 million to Support Charitable Causes Throughout the Province"

in Westworld magazine (January/February 1982; Vol. 8, No. 1). It publishes an Annual Report.

Corporations

Corporate giving is another major category of support which your group should consider. As with foundations, it is necessary to understand clearly what you need, what the most reasonable groups to approach are, and what their goals and requirements are. There are differences between corporations and foundations, however. There are also special sources to consult when doing your background research.

"Corporation," as the term is used here, covers companies of greatly varying size, from the local independent grocery to the Aluminium Company of Canada. What these companies often share is a belief that they have an interest in and a responsibility for the quality of life within the community in which they operate. Corporations are able to make donations to groups holding a charitable donation number from Revenue Canada and have that sum deducted from their taxable profit.

Since corporate donations budgets are usually formulated as a percentage of annual profits, the size of these donations will fluctuate with the state of the economy in general and the success of the corporation in particular. Remember that there is no requirement for a corporation to donate anything at all.

Corporations, like foundations, are able to distribute financial aid. In addition, corporations are able to contribute the

equivalent of money through gifts-in-kind: lumber from a mill, typewriters from an office supply company, and so forth. They are also able to provide their employees' time and specialized skills. This is an important advantage. While some foundations, such as the Vancouver Foundation, have the staff to aid in proposal development, most do not have the personnel or skills present in corporations.

In general, when you are seeking support from a corporation, you will need to be able to convince it that it is in its interest to support you. As with a foundation, a corporation will want to learn that your project is a sound one; that it addresses a real need in the community; that it will help meet that need; and that your group is the best one to execute it.

A corporation will likely want to know also what specific benefits will flow to it as a result of its involvement: how its support will be acknowledged or publicized, how it will improve the competence of the work force, if it will add to the quality of life in the community, and if it will remove points of distress for its workers.

Sometimes, it may help to be very specific and ask a corporation to underwrite or co-sponsor a special event--the Destack Corporation Lecture Series, for example. Alternatively, you may want to ask a corporation to support a specific component of the project, such as day-care costs for those mothers attending a lecture series.

When you are preparing your list of corporate donors to approach for support, there are four general rules-of-thumb for maximum success:

Rule 1: The closer you are in terms of distance to the corporation or its local plant or division, the better your chances of receiving support. Local businesses are by far your best prospects. They understand your community and its needs and they feel most strongly the need to help. If you are seeking aid from a national corporation which has a plant or offices in your community, make your initial approach to the local manager. His or her support will be required before the national office will act.

Rule 2: The more personal the ties of the corporation with your group, the more likely it is to help. When you are drawing up your list of prospects, be sure to include those corporations with whom you, your advisory committee, or your board of directors have direct, personal contacts. Also, corporations which have donated to your group in past years should be considered.

Rule 3: A close "fit" between the goods or services offered by a corporation and those of your group or its project might help to tip the balance in your favour. For example, a local bank may not be as willing to help sponsor a project on macrame as a local craft supply store. Also consider who might have a direct interest in the kinds of people served by the project.

Rule 4: Most corporate gifts are made by the larger firms. Obviously, the larger firm usually has more to give than the smaller firm. This is counteracted by the fact that the smaller firm may be more profitable or by the intangible fact of generosity. Some smaller firms may be just plain more generous. In general, the larger corporations have better developed corporate donations policies and the resources to back them up.

As with other resource agencies, it is necessary with corporations to do a little homework to figure out whom to approach and how to do it. You and your group should probably sit down first and do a little brainstorming to draw up a list of all the local businesses in the area which might be approached, thinking of personal connections, "tie-ins," and those large enough to be able to afford the sums of money you require. You will want to find out the address and telephone number of a company, who to contact, what the company does (showing you what its interests are), how large it is, how profitable it has been recently, and what its corporate donations policy is.

Build an economic profile of your community, learning which are the major businesses and which of these have a keener sense of community responsibility. Many Chambers of Commerce, Better Business Bureaus and Merchants' Associations have lists of members which may be available publicly. If your community isn't too large, the Yellow Pages of the local telephone directory may be a good place to start.

For corporations of a larger nature which may be located in your community or have a branch plant or some other tangible connection, there are other ways of finding out this kind of information. Look for these books in the reference section of your local libarary:

British Columbia, Ministry of Industry and Small Business Development. British Columbia Manufacturers' Directory: A Directory of Manufacturing Activity in British Columbia. Victoria, 1984 edition.

This resource has been published annually since 1975. Manufacturers are listed alphabetically, by product and by location. Included are addresses, telephone numbers, staff size and products, but not officers. Retail sales, distributing and servicing companies, and sawmills are not included.

Scott's Directories: Western Manufacturers
Scott's Directories, Oakville, Ontario, 7th edition, 1985-86.

This resource includes an alphabetical listing of manufacturing establishments, a list of manufacturing establishments by community, including addresses and telephone numbers, operating executive titles, products and number of employees. A list of manufacturing establishments arranged by product is featured.

Canadian Trade Index
Canadian Manufacturers' Association, Toronto, Ontario. Annual.

This yearly index lists over 13,000 manufacturing firms including the size of the company, chief executive officers, and products. It is also arranged by community.

Directory of Directors 1985
Compiled and published by The Financial Post.
Annual.

This useful volume includes a listing of directors and executives of Canadian companies who reside in Canada, with their executive position and directorships, a listing of the top 500 companies in Canada with addresses, telephone numbers and chief executive officers, and an alphabetical listing of selected Canadian companies, with boards of directors and chief executive officers, regardless of residence.

Corporate Giving in Canada, 1983 Summary
Available from Institute of Donations and
Public Affairs Research, 55 University Avenue,
#600, Toronto, Ontario M5J 2H7

In order to find out more about the directors or chief executive officers of the companies you are considering approaching, try looking up their biographies in any of the following books:

Who's Who in Canadian Business
ed. by Evelyn Davidson
Toronto: Trans-Canada Press

Who's Who in Canada
Agincourt, Ontario: Global Press

Canadian Who's Who
Toronto: University of Toronto Press

The biographies in these yearly publications may indicate something of the interests and activities of the people you may be approaching for aid. These resources will, of course, only be useful for the larger corporations in your community.

When you are building your list of corporations to approach for support, don't forget to keep your eyes open to relevant

articles in the local newspapers. Some groups even keep an ongoing clipping file of articles which might offer some insights into corporate donations activity in your community. Ask groups similar to yours about those agencies from whom they have received aid. Talk to your advisory committee or anyone else who is knowledgeable about whom to approach.

Write for the Annual Report of any corporation you are considering and study it. As one group in the field has advised: "Successful fund-raising calls for a reasonable knowledge of the donor company's objectives and requirements, along with the ability to put this knowledge to work in communicating effectively . . . . Having gathered this information, you are now in a position to submit a request that is reasonable and relevant to the company's interests and resources."[10]

Finally, there is a brief, 24-page guidebook you may wish to write away for. It is called "Approaching Corporations for Support." It is published by The Council for Business and the Arts in Canada, P.O. Box 7, Suite 1507, 401 Bay Street, Toronto, Ontario, M5H 2Y4. Telephone (416) 869-3016. While intended as a guide for arts organizations in Canada, it is of great use for any group.

Government Agencies

Historically, reliance upon public sector spending in traditional philanthropic fields has been great in Canada. While the amount of funding has remained large in comparison to that

contributed by foundations and corporations, the vehicles of delivery of this funding are in constant flux. The programs, the criteria, the actual people administrating programs, and the size of programs often seem to change drastically with elections and shifting governmental priorities. While politically and socially such changes may or may not be for the best, as community resource developers your task is made more difficult. In such a situation, you need to maintain your flexibility and adaptability.

As with foundations and corporations, before contacting governmental agencies you must first thoroughly understand your project: what kinds of needs it will address, who it will touch, and which kinds of services it will stress. You should then go and check directly with the appropriate government agency to find out what is currently available.

Contact a program officer and discuss with her or him the project for which you are seeking support. Make sure that you fit the current eligibility requirements before making a formal submission. Find out deadlines, the need for application forms, and the size of grants awarded by the specific program. Be sure to ask if there are other programs for which your project may qualify; there might be one even more suitable or remunerative than the one you make your initial enquiry about.

Many of your best leads to appropriate governmental programs will come from other groups or individuals involved in activities similar to yours. Do not hesitate when you are talking about

your project with a project officer to ask where he or she would recommend to go for additional support. Referring you to other sources is usually considered part of the service which project officers are mandated to provide. They are often quite knowledgeable and helpful in doing so.

Personal contact is an important first step. Most often this means contact by the telephone. The three appropriate government telephone directories are a good first reference tool:

Government of British Columbia Telephone Directory

Available from:
Queen's Printer
506 Government Street
Victoria, B.C.
V8V 4R6
$4.00

Government of Canada Telephone Directory, Pacific Region

and

Government of Canada Telephone Directory, National Capital Region

Available from:
Canadian Government Publishing Centre
Supply and Services Canada
Ottawa, Canada
K1A OS9
The Pacific Region is presently $5.50 and the Capital Region is $9.75.

If you are calling government agencies in Ottawa, mention that you are calling from British Columbia and ask them to call you back on their WATTS line. They will not accept collect calls, but this is a legitimate way to proceed.

There are also several good comprehensive listings of governmental programs. The Canadian Centre for Philanthropy, creators of the very useful Canadian Directory to Foundations and Granting Agencies: Volume 1: Foundations, plans to issue Volume II: Governments at some time in the near future. Since the Centre's information is taken from its computer data base, those wishing the most up-to-date information on the rapidly changing field of government support might consider commissioning a specific search by the Centre.

Another useful information source has been prepared by the Voluntary Action Directorate of the Secretary of State:

Sources of Government of Canada Support to Voluntary Organizations, 1984 edition

Available from:
Communications Branch
Secretary of State Department
Ottawa, Ontario
K1A OM5
(819) 997-0055

This 55-page book contains extensive material on federal programs available for voluntary organizations and those working with them. It outlines the purpose of each program, basic eligibility requirements, total available funds, and who to contact for further information. It covers programs for fourteen major federal departments and agencies.

If you happen to be a British Columbia business or are working with community groups which include business interests, there are three sizeable books aimed at you:

ABC Assistance to Business in Canada: A Handbook of Federal Assistance Programs Including a Supplement of Programs Offered by Yukon Territory and the Province of British Columbia

Available from:
Federal Business Development Bank
Management Services
Suite 1600
360 St. Jacques Street
Montreal, Quebec
H2Y 1P5
(514) 283-5904

J. Peter Johnson. Government Financial Assistance Programs in Canada. 2nd Edition. Montreal: Price Waterhouse, 1982

Distributed by:
Butterworth and Co. (Canada) Ltd.
2265 Midland Avenue
Scarborough, Ontario
M1P 4S1

Assistance BC: A Directory of Government Assistance
Victoria: Ministry of Industry and Small Business, April 1981
(604) 387-3350

The following is a list of some governmental agencies which may be of interest to groups attempting to meet community education needs. It is intended merely as a starting point for your own research. As with foundations, you should imaginatively analyze your project to attempt to find other tie-ins. This listing is only to indicate the kinds of support which are available. Quotations are taken from material published by the various agencies.

New Horizons Program
Main Floor
1525 West 8th Avenue
Vancouver, B.C.
V6J 1T5
(604) 732-4303

Developed in 1972 by the Department of National Health and Welfare, New Horizons is intended to "encourage and enable retired Canadians to become more actively involved in the life of their community. This objective is accomplished through the distribution of cash grants to groups of older people to provide them with an opportunity to share their interests, skills and talents in developing and carrying out projects of their own choosing. These projects are intended to be of benefit to the participants and others in the community. The accent is on local needs as identified by senior citizens and their willingness to meet these needs." The projects cover a wide range of activities including continuing education, sports and recreation, crafts and hobbies, and information services. Contact the program at its regional office in Vancouver or check in your telephone book to see if there is a local office.

Multiculturalism Canada
The Department of the Secretary of State
Regional Directorate
207-1525 West 8th Avenue
Vancouver, B.C.
V6J 1T5
(604) 732-4111

The federal Department of the Secretary of State has quite a few grant programs which attempt to improve the participation of citizens in all aspects of Canadian society. If your group is

representative of an ethnocultural community or can demonstrate the support of a group from this community, there are several programs which might be pertinent. Contact Multiculturalism Canada and inquire about their Cultural Enrichment Program, Cultural Integration Program, Group Development Program, Intercultural Communications Program, Performing and Visual Arts Program or other programs they have which might be applicable for your project.

Women's Program
The Department of the Secretary of State
207-1525 West 8th Avenue
Vancouver, B.C.
V6J 1T5
(604) 732-4111

Another program of the Secretary of State, this one attempts "to provide support for women's groups who are promoting a greater understanding of the status of women in Canada and are engaged in developing the knowledge and skills necessary for effective participation by women in all aspects of Canadian society." Project funding is provided for community education, conferences, and the like. Investigate the Secretary of State's Native Women's Program, if that is applicable.

First Citizens' Fund
333 Quebec Street
Victoria, B.C.
(604) 387-1011

"The purpose of the First Citizens' Fund is to enhance educational, economic, cultural and recreational opportunities for

native Indian residents of British Columbia. The Fund is a self-help program. It provides incentive bursaries for students and grants for constructive and innovative projects." The Fund will not finance projects which can be funded under existing programs of the provincial or federal governments. It will fund "events such as seminars and conferences, designed to promote communication and information sharing among native peoples" as well as "projects designed to promote cultural and recreational activities." Only projects endorsed by the community involved will be considered for funding.

If you are organizing a project related to the needs of native people, you should also investigate funding from the federal Department of the Secretary of State and the Department of Indian and Northern Affairs.

British Columbia Heritage Trust
Parliament buildings
Victoria, B.C.
V8V 1X4

If your project is connected with some aspect of the historical heritage of British Columbia, you may wish to contact this group to see if you fit into one of their several programs. Heritage-oriented projects could possibly be aided by their Planning and Inventory Assistance Program, Heritage Area Revitalization Program, Building Restoration Program, or Publications Assistance Program.

Community Orientation

Although it is often productive to seek support from foundations, major corporations and provincial and federal governmental agencies, don't loose sight of the fact that, in many cases, your major source of support will come from your local community. Contributions may be available from the local Chamber of Commerce, the municipal government, community service groups such as the Rotary, locals of unions, churches, and banks. As we pointed out in Chapter Two, these groups have much more to give than money. They can give space, volunteer help, lend equipment, and provide a forum for publicity about your project. Enlisting their support will also in many cases help you in getting outside support from foundations, corporations and governmental agencies. Remember that community resource development begins in your own community. As you approach outside agencies, your greatest strengths will come from a community orientation.

Case Study #3

Computer-Assisted Instruction

Sometimes successful community resource development starts with a casual conversation. That's the way one project started in North Vancouver.

Barbara McBride, Coordinator of Adult Basic Education, and Judith McPhie, Coordinator of Native Education, both of the North Vancouver School District, were talking one day about the fact that a large number of native Indian children were not succeeding academically. Many native Indian adults were returning to school and having similar problems.

Barb and Judith decided to look into the problem a bit further. They found out that research on learning styles indicates that native Indians learn more through the use of visual than verbal means. They also found out about the Kirkness Learning Centre in Winnipeg which serves a large population of native Indians through the extensive use of computer-assisted instruction.

Judith and Barb decided to see if they could put computers into Queen Mary Community School. Queen Mary serves approximately three hundred people, 30% of whom are of native Indian heritage. It houses an adult learning centre and an elementary school. Judith and Barb found out that they could buy the needed computers and software packages, consisting of reading and mathematics curricula for grades 3 to 12, from a company with some experience

in similar projects. These resources would be shared by both children and adults.

The next step for Barb and Judith was to find some allies. They spent several months talking with the staff in the school and with the parents and community members who belong to the Queen Mary School Association, a private non-profit society. They collected supporting letters and relevant statistical data. They also wrote up a project description.

Judith and Barb sent out sixteen letters of inquiry to foundations they identified as possible contributors to the project. They found out some of these no longer existed. Many said the request was inappropriate to their funding mandate. Five or six sent back application forms. Judith and Barb learned that most foundations and resource agencies require a non-profit society, with a tax-exempt number, to sponsor requests for funds. So the Queen Mary Community School Association became the actual applicant.

As they applied to foundations and other granting sources, Barb and Judith learned that they had to ask for grants which were consistent with the normal bequests of the agencies. They also learned that they should ask for support for specific uses. In the end, they raised the $70,000 they required from five agencies:

H.R. McMillan Trust	$35,000
Vancouver Foundation	20,000
Squamish Indian Band	16,000
Kiwanis	4,000
Leon and Thea Koerner Foundation	1,000

The Vancouver Foundation grant was especially welcome. As Barb later said: "When we first made verbal contact with the Vancouver Foundation they said our project would not qualify for their funding so there was no point in sending us an application form. We sent them our form intro letter anyway. We were surprised when they sent us their application form and, of course, amazed when they granted us the $20,000 we requested."

As they sought to develop needed learning resources, Barb McBride and Judith McPhie learned a great deal. They learned that community resource development is a process which requires organization and patience. They learned well.

CHAPTER FIVE

CONSTRUCTING A PROPOSAL ASKING FOR SUPPORT

A practical fundraiser once remarked that "starting a fundraising campaign without a solid list of prospects is like setting up a pizza parlor on the Gobi Desert. You may have a wonderful product, but who's going to buy it?"[11] If you have followed the guidelines outlined in Chapter Four, by now you have a modest list of realistic prospects to whom to apply.

As you develop a proposal asking for support, try to keep in mind that behind the names and positions in each resource agency lurk real, tangible individuals, persons whose job it is to allocate the funds or other resources they have been mandated to disburse. It is your job to convince them that they should give these resources to you and your group for your project. Keeping people in mind has already been stressed in Chapter Two in respect to organizing for community resource development. A large part of successful proposal preparation is acting in accordance with this personal perspective.

Build an Effective Proposal

* Always try to establish a personal relationship with the funding agency.

  Make your initial approach by telephone or face to face, if possible. Attempt to deal with the same project officer each time you contact the resource agency.

* Do not use form letters or identical applications for each resource agency.

  They dislike getting them as much as you do. As one fundraiser put it: "Always prepare your grant proposals as if they are personal letters from your organization to a unique funding source."[12] Always adapt your proposals to suit the requirements of the resource agency. For example, don't ask for $50,000 from a group that gives out grants in the $500 range.

* Prepare short, clear proposals.

  Real people do not like to read fifty pages when five will do, and they likely will not read them.

* Be honest and sincere.

  Try to establish a good working relationship with the resource agency. The people reading your proposal are professionals who can usually find padded budgets, unneeded workers, or places where you haven't done your homework. They will hold it against you.

* Try to make their job easier.

  Each resource agency has goals and purposes of its own. Explain explicitly how your program will further these goals. Make it easy for the project officer to understand your case. Give him or her the tools and arguments to make your case when the allocations are made.

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

Initial Contact

Before you write out your formal application, try to talk out the issues and general scope of the project with a representative from the resource agency. You may find quickly that an agency which looked like a suitable prospect on the basis of your research is not interested at all. An initial contact will save you the effort of applying. More often you may find out important information which will be useful in preparing your formal application.

The initial contact with the potential donor should be a voice contact. Usually it will be by telephone, but it can be face to face. Immediately after the interview or telephone conversation, write down in unambiguous terms exactly what was said.

In your meeting or telephone conversation, you will want to determine the answers to several general and specific questions:

* Is your project something the agency is likely to fund?
* Are there any improvements it can suggest?
* What aspects of the project might it fund?
* What are its current granting priorities?
* Does it like to be the sole funder of a project or does it want others involved?
* Can it suggest other appropriate granting sources?

If you do not know the answers to the following questions, now is a good time to ask:

* When is the application deadline?
* How many copies of the proposal are needed (The McLean Foundation, for example, requests sixteen copies of each proposal!)?
* What should you include in the proposal?
* Are audited financial statements necessary?
* Are letters of reference necessary?
* What size of grant does the agency usually make?
* Who should make the application?
* Is there an actual application form you need to fill out?

You will not have a long time to establish your credibility at the initial contact. Need it be said that you should be prepared before you pick up the telephone or open that office door? Find out all you can about the resource agency by using the techniques suggested in the previous chapters. Be ready to answer the kinds of questions the resource agency representative is likely to ask. Make sure that you are able to describe the project accurately and briefly, that you can establish the need and the ability of your group to meet that need in a few sentences.

At the close of the interview or telephone conversation, make sure that you have agreed upon a next step. Always be clear about what is expected of you and when you need to do it:

* Will you and the resource agency representative meet or talk again? If so, when?
* Is material going to be sent to you?
* Should you write up your proposal and submit it?
* Does the agency want a short abstract of the proposal first and then you'll talk again before submitting the full project application?

Often verbal communication with the resource agency can be of such detail and explicitness that you will know before you formally apply that you will receive support. One of the more successful community resource developers in British Columbia claims to know the answer beforehand in seventy-five percent of the cases in which an application is made. If you are not known to the resource agencies you are working with, you cannot expect that high a figure.

Components of a Proposal

There is nothing mystical about preparing a sound proposal. All you need is a good, well-thought-out idea and the patience to construct a clear, well-written presentation of that idea. If your resource agency has provided you with an application form or otherwise indicated explicitly what it wants to receive, follow these requirements exactly. Answer all the questions, even if you believe them to be off the mark or redundant. If the resource agency asks merely that you submit a proposal, the format outlined in the accompanying box is one commonly used. We will discuss each listing in the pages which follow.

1. Covering letter

This is going to be the first item read by the potential donor, so work hard on its tone and clarity. It should be on letterhead stationery and should be brief, one or at most two pages long. It must have the name, address and telephone number of the

Present the Proposal Properly

The following is one outline for a well-worked-out project proposal:

1. Covering letter
2. Title or cover page
3. Table of contents
4. Summary of proposal or abstract
5. Introduction to main body of proposal
6. Statement of need or problem addressed by project
7. Project objectives
8. Project description
9. Capacities of sponsoring agency or organization
10. How the project will be evaluated
11. Future plans
12. Budget
13. Appendices

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

sponsoring organization as well as its charitable donations number. The letter should be from the most senior official of the organization and should be signed by him or her. There should be a very brief explanation of the project and the name of the person who will be in charge of it. The letter should be personally addressed to the person in charge of the resource agency or the project officer with whom you have been in contact.

2. Title or Cover Page

This page may be a different colour or texture than the rest of the proposal. It should include the name of the project, the name and address of your organization, the date of submission, and the words "Submitted to . . ." (fill in the name of the resource agency). Selecting a title for your project should be done carefully. Make sure it contains enough useful information so a reader can gain specific knowledge about the project. Stay away from showy but empty phrases such as "Opening Vistas: a Synergetic Approach." Avoid professional jargon and acronyms such as "BTSD" which may be incomprehensible to the reader. Keep the title short.

3. Table of Contents

You want to make this proposal as easy as possible to comprehend by the reader. A table of contents shows the reader what you are including in the proposal and in what order. List by title all the appendices you are including.

4. Summary of proposal or abstract

This really should be no more than 250 words long. You want to cover the need for the project, its objectives, and significance; your project description; your group's capabilities; the expected outcome and project cost. This abstract should be precise but lively. Remember the potential donor could easily stop reading right here.

5. Introduction to main body of proposal

Here you want to go into slightly more detail than in the cover letter or abstract. Introduce your organization and its background. Describe your community and the need being addressed by the project. Lay out the benefits to the donor from supporting the project. Convey your sense of urgency or enthusiasm without becoming maudlin or overdramatic.

6. Statement of need or problem addressed by the project

This is where you need to become specific. State the problem clearly and succinctly, using relevant statistics or supporting data. Since you want to keep the actual proposal brief and easy to read, put your surveys, tables, etc. in the appendices and refer your reader there, if he or she wants to see more supporting data. Include background material about your community which might help the reader who is not familiar with it to understand the context in which the need has arisen.

7. Project objectives

In the statement of need you told the resource agency that there is a problem, why you're asking for support. Now it is your job to tell it exactly what you propose to do with its money. Think of this process as one of clarifying your goals and objectives. Goals are stated in general terms--the elimination of illiteracy, the inclusion of all community groups in the educational process and the like. Objectives are stated in performance terms. Some examples are:

* to instruct fifteen adults to reach a Grade Six reading level
* to hold four open houses
* to conduct an information campaign
* to reach adult New Canadians and inform them about continuing education possibilities in the school district.

You should be particularly careful in formulating your objectives. Objectives should be measurable and observable. The resource agency learns from them what you plan to do, what outcomes you expect, how long it will take, and how you will know whether you have been successful or not.

8. Project description

The potential donor wants to know the important details of your project, things like timing, staffing and institutional support. How many staff will be involved and what are their duties? What skills and abilities will they need? If the people have already been selected, include their resumés in the appendix. If you

will be hiring, include job descriptions for each position in the appendix. Who will be responsible for the management of the project--your chief executive officer, a committee, the project head? Who will be affected by the project--how many people? What are their socio-economic characteristics? How large a geographic area will the project cover? What will you be doing--researching, facilitating, informing, making a report, feeding people, or what? Where will you do it and for how long? What kinds of supplies, equipment, or materials will you need? Will there be a product produced?

Here you want to be tangible and factual, to give an imaginable picture of the project when it is happening. You want to convey your grasp and mastery of the details involved without bogging down your reader in unnecessary facts--a fine line to walk.

9. Capacities of sponsoring agency or organization

Now that you have established a community need, outlined a program, and demonstrated an effective project to alleviate that need, you must convince the resource agency that yours is the group for the task. As one professional fundraiser said: "This is no place to be modest."[13] If you have already had similar projects in the past, if you have established relationships in the community, if you have previously shown that you could develop community resources, now is the time to say so. The resource agency won't know unless you tell them. Describe the strength of your support within your larger organization. Place letters

of support and endorsements from third parties whose cooperation is necessary in an appendix and refer the reader there. Point out the kinds of support and contributions you and your organization are willing to provide.

10. How the project will be evaluated

The resource agency (and you!) will want to know that its support was well used. If you have formulated your objectives correctly and made them quite explicit, you should be able to show at the end of the project how close you came to meeting these objectives. Indicate in your proposal, the answers to the following questions:

* Will you use an internal evaluation or do you plan to bring in an outside evaluation team?
* Are you going to assess the project before its completion to see if you are on track?
* What will the resource agency receive from you at the end of the project?
* Will there be a written report? What approximate length will it be?

Evaluation will be discussed in more detail in the next chapter.

11. Future plans

While most resource agencies are most comfortable with projects that have a clear beginning and end point, they will also want to know what will happen to the project when its support period is ended. Will the activity simply cease occurring? Will it become self-supporting? Will it be supported by your group or someone else? How will the project results be disseminated to the community?

Obviously, the better you can demonstrate that the project will have a lasting effect, the happier the resource agency will be.

12. Budget

The budget you submit is a direct reflection of the care and attention to detail which you have spent developing your project. Take the time to create an accurate and realistic budget. Get actual estimates on costs such as printing, equipment rentals and the like, and investigate how much people with the skills you want will cost to hire.

A budget line for "miscellaneous" or "contingency" is acceptable, but too large a sum listed here indicates that you are not very confident about your ability to estimate expenses. Having a budget line for overhead costs of ten to fifteen percent is not considered bad form by many resource agencies. If there is some budget item--like travel or consulting fees--which may appear unusually high in your project, take the time in an appendix to detail and justify these costs so the resource agency can see that the costs are reasonable.

The larger the sum of money you are asking for, the more detailed must be your budget. Break down items like "salaries" into explicit listings of how many people and how long they are working. If your project has different phases or components, provide budgetary information separated into the same units.

If you are asking the resource agency to fund only a part of the project, clearly indicate what part is intended. This might

Improve the Quality of the Proposal:

a Check List of "Do"s and "Don't"s

* Do keep the proposal brief. Fifteen pages is considered a long proposal. If you feel you must include something beyond that, put it in the appendix.

* Do use correct grammar, punctuation and spelling. Poor writing can only hurt your application. Even if you believe that you write proper English, have the proposal copyread by someone else to catch errors. Have a book outlining correct usage on your desk at all times and use it frequently.

* Do submit a neat and well-proofread copy of your proposal. Just as there are people who hate misspellings, there are people who believe that the quality of a proposal is partially reflected in the care of its presentation. These are the people who feel that: "If they can't even do this well . . . why trust them to spend our money."

* Don't make your proposal too slick or flashy looking. If you spend too much on fancy covers or four colour printing, the agency may well wonder if you need support that badly or whether you would squander any funds it might donate.

* Don't try to cram your proposal into fewer pages by sacrificing adequate spacing and sub-headings. It won't make it any shorter to read and will actually make it harder for the reader to enjoy and comprehend. Good layout in a proposal will in fact make it easier for the reader to see the important points and read more smoothly.

* Do use a level of language and an editorial style which is appropriate. Avoid professional jargon, clichés, catch words or slogans. Your proposal is to communicate information, not show off how many fancy words you know. Funding agencies go over many different proposals in a year; they want ones they can understand.

(Continued on next sheet)

* Do avoid using tentative words such as "seem," "attempt," "try," or "maybe." You want to convey a sense of control or positiveness.

* Do remain personally cheerful and polite during all interactions with the resource agency and in the text of your proposal. You do not build yourself up by tearing someone else down.

* Don't write the proposal by committee. Although you should build your ideas by talking and working with others, the written work is best done by one person. This maintains a consistency of style and argument.

* Do know your audience and gear your presentation toward it. Address its review criteria. Make it feel the proposal was written with it in mind.

Community Resource Development: A Community Education Guidebook by Maureen Cassidy and Frank Cassidy, 1985.

best be accomplished by providing a copy of the whole budget and then drawing up a separate budget for the particular resource agency.

13. Appendices

Since you want to keep the project proposal as short and clear as possible, you should use appendices to provide supporting information which might clutter the main text and distract the reader. This is where you will want to put your group's Annual Report, letters of support, resumés, budget justifications, statistical support for determining community need, copies of clippings about your organization and the like. Be thorough, but, again, don't get carried away. A resource agency is not impressed with bulk, only competence. You might want to duplicate the appendix in a differing colour than the actual proposal to set it off and aid the reader in comprehending your total proposal.

One-way Communication

When preparing your proposal, remember that it is basically a one-way exercise in communication. No matter how extensively you have worked with the resource agency in the development of the project, the proposal must stand on its own and communicate the totality of the project to the reader, to any reader who happens to pick it up, not just someone previously familiar with your group or the project. The important points must be obvious and quickly discernible. Your competence must radiate from the sheets of paper.

Further Reading:

Daniel Lynn Conrad and the Research and Development Staff of The Institute for Fund Raising. The Grants Planner: A Systems Approach to Grantsmanship. San Francisco: The Institute for Fund Raising, 1978.

Has a good section on writing proposals. Some of the other advice contained is not as useful.

Lynda Cronin. A Fund-Raising Guide for Native Groups. Ottawa: Canadian Association in Support of the Native Peoples, 1977.

Excellent, even for non-native groups.

Donald C. Orlich and Patricia Rend Orlich. The Art of Writing Successful R & D Proposals. Pleasantville, N.Y.: Redgrave Publishing, 1977.

A slightly more academic treatment, but very helpful.

CHAPTER SIX

RECEIVING SUPPORT

One day, if all goes well, you will open a letter and inside will be a cheque or instructions on how to get it. That day you should immediately send a personal letter back to the resource agency thanking it, stating that you have received the cheque (note the sum), and enclosing a tax-deductible receipt, if needed. This should always be done as a matter of course. If it is appropriate, you should also consider acknowledging the donor's support publicly. Write up a press release or a story for your newsletter if you have one.

Assuming that this particular bit of support is what you have been waiting for to begin an activity, you are now in a position to go ahead. If this support is only a part of what you will need, bank it and wait for enough support to show up to cover the activity adequately. Never assume that you can start and the rest will come in somehow. If for some reason it doesn't, you may well have wasted the money on a partially completed activity.

Let's say this is it; you can start. What should your relationship with your donors be? How should you handle the project to fulfill your responsibilities toward your donors? And, finally, how do you work forward to define and meet additional

resource needs in the future? We will consider each of these questions in turn.

Relationship to Donors

At the start up of the project, it is necessary and polite to contact, either by telephone or letter, all of the individuals and groups who were involved in the formulation of the project. Don't overlook the fact they donated their time and expertise to the successful development of your project when you needed help. Be sure to notify all members of your advisory committee, executive officers of your organization, and everyone who wrote a letter of support for you.

This is also the time to contact the other community groups who offered you aid and advice. If they offered some of their resources and you accepted, work out the details of when and where such aid will be needed. Make sure they realize that you appreciated their advice and that you will do the same for them. If the project is of reasonable size, publicize it to the larger community through newspaper stories, advertisements, or media interviews. Remember, all that community support was just as important as the actual funding in getting your project off the ground.

Consider maintaining community involvement as a priority during the duration of the project. Write stories for inclusion in relevant community newsletters. Keep community leaders routinely and informally up-to-date on how progress is going.

At the conclusion of the project, a summary of the results should be made available to the community. Those running community and continuing education projects are forever surveying, requesting assistance, seeking information from people. Those asked to help out are seldom appraised of the results, and they should be.

The resource agencies themselves may request formal reports and financial statements at specified intervals. In some cases, these reports may be a prerequisite for their releasing some part of the funding granted. Many corporate and foundation agencies may not explicitly require reporting, but you should do so anyway. As one fundraiser said: "If they only hear from you when you want their money, they won't be impressed."[14] A slightly more cynical one put it this way: "Funding sources are like some parents. Though they may 'give' you your allowance, they still want to know how you spend it. They also want to know you're grateful for it."[15]

Donors can be sent copies of any recent press clippings about your group, copies of newsletter stories, and other pertinent printed material. They should definitely be sent a copy of your Annual Report if you publish one. In fact, copies of materials regarding your efforts to keep the community informed and involved will be useful to send to the resource agency.

At the conclusion of the project, the resource agency will need a complete and honest reporting of how the project went and how the money was spent. Make sure to prepare this report with care, and to attach a statement of appreciation and thanks.

Responsibilities

Specifically, in terms of project management, what are your responsibilities to those who have donated resources? First, you have the responsibility of politeness. Every donation, even if only the loan of a slide projector or the use of a mimeograph machine, should be acknowledged promptly and in writing--for your files and theirs. Be as polite to those who have donated the little resources as to those who have donated the big ones.

Second, you have a responsibility to use the resources for the purpose for which they were donated, and only for that purpose. Your project should have been thought out so carefully that no major surprises should occur, necessitating major changes. If something comes up and you feel the need to change the project from its originally proposed form, be sure to notify the donors of these changes and get their support before you act.

Third, you have the responsibility to perform quality work on your project. There are two ways to look at this responsibility. Looking at it one way, you have a duty to help alleviate the community need you demonstrated to get the project off the ground. The community resources were given to you as the one who could do it best and it's up to you to do so. Looking at it another way, you can know that, if you do a lacklustre job now, it will be hard to get any support in the future.

Finally, you have the responsibility to keep good records during the project. By accepting support you have accepted the

accountability for that support. You must have the records to show what you have spent and when you did it. At the end of the project you will be required by the funding agencies to provide an accounting of the expenditure of all funds. Keep track in writing of all the resources donated to you by the community.

More than strict financial accountability, you also have the responsibility to demonstrate at the end of the project exactly what was accomplished and whether your efforts were effective. This process of evaluation is an indication that you're serious about your purposes, that you are constantly looking for ways to improve your performance. It is also a mechanism by which your funding agencies can see that their money was well used. An evaluative report is a way of showing something concrete to the funding officers. If it is published, it can be your way of presenting your results to interested members of the community. Its findings can point the way to continuations or amplifications of your activities in the future. Such a report is also useful to present in future grant applications.

Smaller projects can make do with an internal evaluation. Larger projects should bring in outside evaluators. If outside evaluation is required, make sure that you and the donor agencies agree before hand on the appropriateness of the evaluators chosen.

Your evaluation will, of course, be aided in no small measure by clearly and explicitly formulated objectives, as suggested in Chapter Five. Success comes in knowing that you have achieved

your objectives within the time frame, costs, and personnel hours allotted. The more completely you can make your objectives "objective," that is, having measures that are not based upon personal opinions, the easier your job will be. For example, it is hard to prove that someone is "happier." It is relatively easy to establish that that person is reading at a higher grade level than before.

While you should concentrate on the positive aspects of the project, if there were major problems--either in the project design or in its actual implementation--these should be addressed by the evaluation. Careful analysis of mistakes can be fruitful to those who come later. As one fundraiser advises: "Of course, everyone would like to have a success story to tell, but if you do not have one, don't try to make one up or not report at all. Admitting your mistakes may be painful and embarrassing, but it enables you and other groups to ask for help again. Silence closes the door completely."[16]

Never underestimate the amount of time and effort it will take to close down a project as it approaches completion. Make sure that you have allotted enough time to edit, proofread and duplicate your report gracefully. Don't forget the time for the final thank-yous to all who have supported the project and the time it takes to return borrowed items properly. Take enough time to do a meaningful evaluation. The care with which you are able to end a project is important in setting the context for future

support. It demonstrates the professionalism and willingness to be accountable of you and your group.

Aiming Toward the Future

If you and your group anticipate needing to use and develop community resources on an ongoing basis, the time to plan for the next project is well before the end of the last one. Community resource development is a process that is ongoing. There will be points of heightened awareness of it for your organization, such as when you are preparing a formal application to a resource agency, but community resource development needs continual attention.

This is so for several reasons. Since one factor in the decision of whether or not to give you aid is your track record for other projects, you must have current projects that not only are doing well, but appear to be doing well. Keep your activities visible to people who are either supporting you or who might do so in the future. Favourable publicity of any form--word of mouth, media attention, open houses you might hold--improves your credibility in the community and improves your chances at gaining resources in the future.

Given the long time lags often present in gaining resources, it is often necessary to start planning for a project well before its inception. The development of new donors can be slow. Not only do you have to take the time to find them, there are also lags due to infrequent application deadlines and funding decisions.

A Basic Community Resource Development Library

The following is a short listing of material which should be present in the office or within easy access of someone engaging in community resource development.

CE Programmer's Manual

Ministry of Education, Continuing Education Division, 1981 (see Page 15)*

Census Stats for Community Education: A User's Manual

Ministry of Education, Continuing Education Division, 1983 (see page 15)

Getting to Know Your Community: Data for Adult Education Programming in British Columbia

Ministry of Education, Continuing Education Division, 1984 (see page 15)

Canadian Directory to Foundations and Granting Agencies: Volume 1, Foundations

The Canadian Centre for Philanthropy, 1982 (see page 45)

Scott's Directories: Western Manufacturers

Scott's Directories, 1985-86 (see page 56)

Government of British Columbia Telephone Directory

Government of Canada Telephone Directory, Pacific Region and National Capital Region

(see page 60)

Sources of Government of Canada Support to Voluntary Organizations

Secretary of State Department, 1985 (see page 61)

Reference Manual for Secretaries and Typists

William Sabin. Toronto: McGraw-Hill Ryerson, 1978. An extremely helpful guide to correct Canadian usage.

* Page in text where complete citation is located.

Some groups may only meet annually or semi-annually, so if you miss one deadline it is a long wait until the next.

From time to time, you will want to keep the groups who have supported you in the past, but are not currently doing so informed. You will also want those groups which have never supported you but have indicated some generalized interest ("We would like to help you but have no further funds this year.") to be aware of what you are doing. Let these groups hear from you periodically. Put them on the mailing list for your newsletter or press releases. Don't dismiss those who reject your proposals; give them time to learn more about you. Try making a few more project applications to them before you give up. If at the close of a successful project, you are holding an open house, conference, workshop or other presentation, be sure to invite representatives from this group of potential sponsors, as well as those who represent the actual donors.

Finally, don't forget that a well-treated current donor is a good potential donor for the future. A resource agency will not want to support you constantly and a community group will not want to loan you its projector forever, but people or groups who have helped you once are likely to help you in the future, unless something goes wrong. If you keep them informed, keep your promises, maintain the quality of your work, and have good records, you won't have things go wrong.

Developing Community Resources

Those who are involved in continuing and community education should find the process of community resource development to be a relatively natural one. Careful planning, attention to community needs, awareness of organizational realities, and the effective use of resources are all important for continuing and community education. Community resource development is a logical and, perhaps, a necessary step for those involved in continuing and community education. Adhered to properly, community resource development can be a process which results in quality products: products that enable communities as well as individuals to solve or alleviate their common problems. This, indeed, is an important goal of continuing and community education.

Footnotes

[1]C.R. Webster, "Public and Private Philanthropy in the Eighties," The Philanthropist. Vol. IV, No. 1 (Winter 1984), pp. 37 and 38.

[2]Kirk Salloum, Private Funding for Elementary and Secondary Education in B.C. for 1983/84: Summary Report. Typescript, 1984 and Kirk Salloum and Norman Robinson. "Public Education-Private ubidy," The B.C. Teacher, December/January 1985, pp. 37-39.

[3]Management Assistance Group Staff, "Steering Nonprofits: Advice for Boards and Staff," Conserve Neighborhoods, Special Issue, 1984, p. 345.

[4]Gordon L. Goldie Co., Ltd., Paying for the Piper: A Fund-Raising Manual for Non-Profit Organizations. Toronto: Ontario Federation of Symphony Orchestras, 1982, p. 2.

[5]Daniel Lynn Conrad and the Research and Development Staff of The Institute for Fund Raising, The Grants Planner: A Systems Approach to Grantsmanship. San Francisco: The Institute for Fund Raising, 1978, p. 38.

[6]Armand Lauffer, Grantsmanship and Fund Raising. Beverly Hills: Sage Publications, 1984, p. 24.

[7]Irving R. Warner, The Art of Fund Raising. New York: Harper and Row, 1975, p. 19.

[8]Warner, p. 6.

[9]Allan Arlett, ed., Canadian Directory to Foundations and Granting Agencies: Volume 1, Foundations. Toronto: The Canadian Centre for Philanthropy, 1982, pp. xiii, xvi.

[10]Institute of Donations and Public Affairs Research, "Corporate Donations: A Guide for Fund-Raisers." Montreal: n.d., n.p.

[11]Warner, p. 43.

[12]Conrad, p. 81.

[13]Lauffer, p. 246.

[14]Joyce Young, Fundraising for Non-Profit Groups: How to Get Money from Corporations, Foundations, and Government. Vancouver: International Self-Counsel Press, Ltd., 1981, p. 88.

[15]Conrad, p. 117.

[16]Lynda Cronin, A Fund-Raising Guide for Native Groups. Ottawa: Canadian Association in Support of the Native Peoples, 1977, p. 20.

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